

Protected Health Information Management Tool (PHIMT)

User Admin
Version 3.0
April 2011



HEALTH AFFAIRS



PHIMT

Training Objectives

- Upon completion of this training you should be able to:
 - Identify the use of the PHIMT in meeting the Accounting of Disclosures requirement of the HIPAA Privacy Rule
 - Describe the necessary policies and procedures
 - Describe the user roles and responsibilities within the PHIMT



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Introduction to PHIMT



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Introduction to PHIMT

Objectives

- Upon completion of this lesson you should be able to:
 - Explain what the PHIMT is and why it exists
 - Describe the capabilities of the PHIMT
 - Identify the advantages of using the tool
 - Identify the 14 Permitted Uses and Disclosures
 - Describe the PHIMT terminology, user roles, and permissions
 - Explain the PHIMT Hierarchy



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Introduction to PHIMT

What is the PHIMT?

- The PHIMT is a web-based application that assists in complying with the HIPAA Privacy Disclosure Accounting Requirement
 - Commercial Off-The-Shelf (COTS) product customized for TRICARE Management Activity (TMA)
 - Deployed in October 2003 with a series of training supporting the deployment to the Military Treatment Facilities (MTFs)
 - Centrally managed application that is accessed via the Internet



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Introduction to PHIMT

Why Does the PHIMT Exist?

- The HIPAA Privacy Rule requires a Covered Entity (CE) to maintain a history of when and to whom disclosures of protected health information (PHI) are made for purposes other than treatment, payment and healthcare operations (TPO)
- Individuals have the right to receive an accounting of disclosures of PHI made by the CE
- Military Health System (MHS) must be able to provide an accounting of those disclosures to an individual upon request
 - Not required to account for disclosures that occurred prior to the April 14, 2003 compliance date
- To comply with this requirement, TMA provides an electronic disclosure-tracking tool



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Introduction to PHIMT

Tool Capabilities

- The tool enables users to:
 - Track PHI requests or release of information
 - Maintain authorizations
 - Track complaints
 - Create an automated workflow process developed by the users
 - Create pre-defined requesters from organizations
 - View the details about the information disclosed
- It allows users to track disclosures, document requests for amendments and authorizations, document complaints and restrictions to PHI



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Introduction to PHIMT

Advantages of the PHIMT

- Consolidates multiple tasks into one electronic environment
- Web based, centrally managed system
- Over 2000 users worldwide
- Protects the data
 - Allows for role-based access in maintaining the records and accessing patient information
 - DISA Protected Enclave
 - Defense Information Assurance Certification and Accreditation Process (DIACAP) certified
- Pre-populated drop-down fields
- Streamlined disclosure process
- Multiple disclosure accounting



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Introduction to PHIMT

14 Permitted Uses and Disclosures (1 of 2)

- Permitted Uses and Disclosures

- For the permitted uses and disclosures listed below, a patient's opportunity to agree or object is not required

- 1. As required by law**
- 2. Avert serious threats to health or safety**
- 3. Specialized government functions**
- 4. Judicial and administrative proceedings**
- 5. Medical facility patient directories**
- 6. Cadaver organ, eye or tissue donation purposes**
- 7. Victims of abuse, neglect or domestic violence**



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Introduction to PHIMT

14 Permitted Uses and Disclosures (2 of 2)

- Permitted Uses and Disclosures
 - For the permitted uses and disclosures listed below, a patient's opportunity to agree or object is not required

8. **Inmates in correctional institutions or in custody**
9. **Workers' compensation**
10. **Research purposes**
11. **Public health activities**
12. **Health oversight activities**
13. **About decedents**
14. **Law enforcement purposes**



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Introduction to PHIMT

Key PHIMT Terminology

- **User** - an individual assigned to an organization within the tool
- **Organization** - a logical or physical entity such as an MTF, a Service or TMA
- **Role** - a named collection of permissions within the tool
 - A user can have the same roles in multiple organizations, or different roles in multiple organizations



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Introduction to PHIMT

User Roles and Permissions

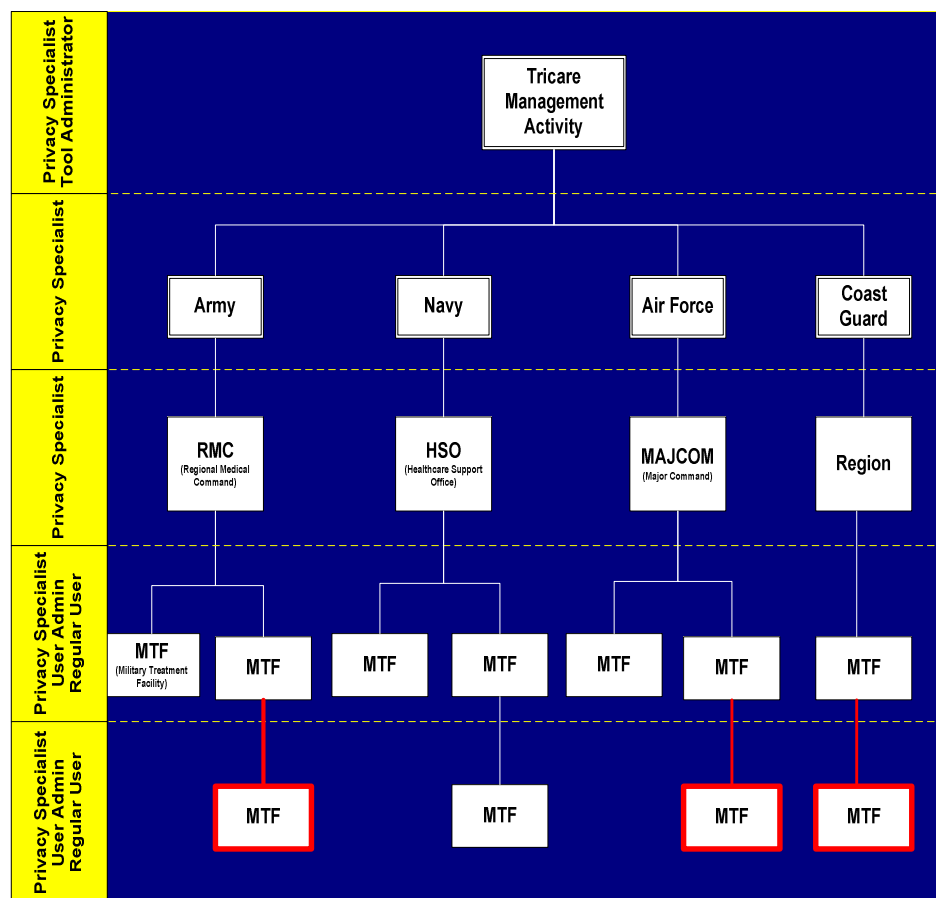
- **User Admin** is a local admin for an MTF or a designated Service. This role may be handled by the email account administrators for each MTF or Service
- **Privacy Specialist** is the Privacy Officer or designee at an MTF or Service level. This role allows the user to maintain disclosure reporting, approve/deny disclosure requests, amendments to requests, restrictions to disclosures, disclosure suspensions and generate associated letters
- **Regular User** is a general role with basic functionality. This role can create disclosures and authorization requests that can be routed on to a Privacy Specialist



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Introduction to PHIMT Hierarchy



* MTF These do not exist at this point, but can be added to the PHIMT



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Introduction to PHIMT

Summary

- You should now be able to:
 - Explain what the PHIMT is and why it exists
 - Describe the capabilities of the PHIMT
 - Identify the advantages of using the tool
 - Identify the 14 Permitted Uses and Disclosures
 - Describe the PHIMT terminology, user roles, and permissions
 - Explain the PHIMT Hierarchy



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User Admin Functionality



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User Admin Functionality Objectives

- Upon completion of this lesson you should be able to:
 - Setup a workflow
 - Setup a queue
 - Create requester favorites



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User Admin Functionality

Common Access Card

- The PHIMT is Common Access Card (CAC) enabled
- All users must have a CAC in order to login to the PHIMT



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User Admin Functionality

Main Screen

Tuesday, June 28, 2005

Logoff

UserAdmin

UserAdmin

Current User:
Scovel, Natalie
US TMA

[My Profile](#)
[My Requests](#)
[My Worklist](#)
[Switch organizations](#)

User Worklist

Activity Instance ID	Request Session ID	Activity ID	Source	Patient	Requester	Status	Creation Date
There are no activities on your worklist							

Naval Hospital Worklist

Activity Instance ID	Request Session ID	Activity ID	Source	Patient	Requester	Status	Creation Date
There are no activities for this queue							

Accept

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User Admin Functionality

Workflow Setup (1 of 5)

- Once a user has been added and their organization and user role is established, the User Admin can establish the workflow for that user's disclosures
- The workflow delineates the process by which requests are routed within the system
- Workflows should be set up so that a Regular User's work will be routed to a Privacy Specialist for approval or denial



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User Admin Functionality

Workflow Setup (2 of 5)

1. Scroll to the bottom of the User Profile screen (Regular User)
2. Click on the New button next to the word Privacy Specialists

The screenshot displays a user administration interface with five distinct sections, each featuring a 'New' button and a table for configuration. The sections are:

- Allowed Worklist Viewers**: Includes a 'New' button and a table with columns 'Name', 'Start Date', and 'End Date'. A message below the table states: 'There are no Allowed Worklist Viewers configured. Click new to add one.'
- Backup Persons**: Includes a 'New' button and a table with columns 'Name', 'Start Date', and 'End Date'. A message below the table states: 'There are no Backup Persons configured. Click new to add one.'
- Information Officers**: Includes a 'New' button and a table with columns 'Name', 'Start Date', and 'End Date'. A message below the table states: 'There are no Information Officers configured. Click new to add one.'
- Privacy Specialist**: Includes a 'New' button (circled in red) and a table with columns 'Name', 'Start Date', and 'End Date'. A message below the table states: 'There are no Privacy Specialists configured. Click new to add one.'
- Request Routing Contacts**: Includes a 'New' button and a table with columns 'Name', 'Start Date', and 'End Date'. A message below the table states: 'There are no Request Routing Contacts configured. Click new to add one.'



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User Admin Functionality

Workflow Setup (3 of 5)

3. Enter Search Criteria for the Privacy Specialist that you want to add
4. Click on the Search button

Monday, January 24, 2005 [Logoff](#)

User Admin

Current Admin:
Scovel, Natalie
US TMA

Organizations
Application Users
Queue Users

[User Search](#)
[Add User](#)

User Profile \ User Search

Name (Last) (First)
Wilson James

System ID (the identifier created by this system for the person)

[Search](#)



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User Admin Functionality

Workflow Setup (4 of 5)

5. Select the appropriate Privacy Specialist from the search results and click on the Select button

Monday, January 24, 2005 [Logoff](#)

User Admin

Current Admin:
Scovel, Natalie
US TMA

Organizations
Application Users
Queue Users

[User Search](#)
[Add User](#)

User Profile \ User Search

Search Results					
	ID	Name	SSN	Birth Date	Address
<input checked="" type="radio"/>	504	Wilson, James			

Other options:
[Adjust your search criteria and try again.](#)

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User Admin Functionality

Workflow Setup (5 of 5)

- Set the Relationship Start Date/End Date (The end date is optional)
- Click on the Save button

Monday, January 24, 2005 [Logoff](#)

User Admin

Current Admin:
Scovel, Natalie
US TMA

User Profile \ Privacy Specialist Details

Related Person: James Wilson

Relationship Start Date (MANDATORY: the date when the relationship began or will begin)
01/24/2005

Relationship End Date (OPTIONAL: the date when the relationship ended or will end)



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User Admin Functionality

Queue Setup (1 of 7)

- A queue is a distribution list for a specific organization that is comprised of two or more Privacy Specialists
- The User Admin at the local command sets up queues
- Queues are created to expedite the process of approving/denying a disclosure
- Only users affiliated with a given organization will see that organization's routing options



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User Admin Functionality

Queue Setup (2 of 7)

1. Select the Admin Tab
2. Select the Queue Users hyperlink

Monday, January 24, 2005 Logoff

User Admin 

Current Admin:
Scovel, Natalie
US TMA

Organizations
Application Users
Queue Users

[User Search](#)
[Add User](#)

Organizations

Origin Organizations					
ID	Name	Parent Name	Address	Contact Person	Contact Phone
<u>1006</u>	10th MED GROUP-USAF ACADEMY CO	USAF	4102 Pinion Drive Ste 4000 USAF Academy, CO 80840		
<u>1109</u>	10th Med GROUP- PETERSON AFB	HQ AIR FORCE SPACE COMMAND			
<u>967</u>	11TH MED GRP-BOLLING	HQ Air Force (Direct reporting unit)	238 Brookley Avenue RM 125 Bolling AFB, DC 20032		
<u>1070</u>	11th Wing	US Air Force	11 MDG/SGHQ 238 238 Brookley Ave Bolling AFB, DC 20032		
<u>833</u>	121ST GEN HOSP SEOUL	18th MEDCOM - KOREA	Unit # 15244 APO AP , 96205		



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User Admin Functionality

Queue Setup (3 of 7)

- Click on the Modify button to add a new queue

Tuesday, January 25, 2005 Logoff

User Admin

Current Admin:
Scovel, Natalie
US TMA

Organizations
Application Users
Queue Users

[User Search](#)
[Add User](#)

Queue Users

User Queue: TMA Medical Clinic

Queue Members

- Joe Jones
- Joe Miller
- Joe Smith
- Pradeep Thaivalappil

All Other Users

- Admin 53
- Admin Admin
- User Admin
- Mike Beedle
- Christopher Brown
- Ted Brown
- Vince Carter
- Andy Cirillo
- Amanda Colantuoni
- Laverneus Coles
- Liza Dorsey
- Amanda Dunlap
- Chad Michael Dunlap
- Chad Michael Dunlap
- Chad Michael Dunlap
- Chris Foster
- Sarkis H Jalkian
- Sarkis Jalkian
- Joe Johnson
- First Middle Last



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User Admin Functionality

Queue Setup (4 of 7)

4. Click on the New button

Tuesday, January 25, 2005 [Logoff](#)

User Admin

Current Admin:
Scovel, Natalie
US TMA

Organizations
Application Users
Queue Users

[User Search](#)
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User Queues

User Queues

ID	Queue Name
1	TMA Medical Clinic

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User Admin Functionality

Queue Setup (5 of 7)

5. Enter the description of the Queue in the text box
6. Click on the Save button
7. Once saved, select the Queue Users hyperlink

Tuesday, January 25, 2005 [Logoff](#)

User Admin

Current Admin:
Scovel, Natalie
US TMA

Organizations
Application Users
Queue Users
[User Search](#)
[Add User](#)

User Queues

[New](#)

ID	Queue Name
1	TMA Medical Clinic
24	Naval Hospital

[Save](#)

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User Admin Functionality

Queue Setup (6 of 7)

8. Select the Queue you created from the drop-down box

Tuesday, January 25, 2005 Logoff

User Admin

Current Admin:
Scovel, Natalie
US TMA

Organizations
Application Users
Queue Users

[User Search](#)
[Add User](#)

Queue Users

User Queue TMA Medical Clinic Modify

Queue Members Naval Hospital

Joe Jones
Joe Miller
Joe Smith
Pradeep Thaivalappil

Enable Disable

All Other Users

Admin 53
Admin Admin
User Admin
Mike Beedle
Christopher Brown
Ted Brown
Vince Carter
Andy Cirillo
Amanda Colantuoni
Laverneus Coles
Liza Dorsey
Amanda Dunlap
Chad Michael Dunlap
Chad Michael Dunlap
Chad Michael Dunlap
Chris Foster
Sarkis H Jalkian
Sarkis Jalkian
Joe Johnson



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User Admin Functionality

Queue Setup (7 of 7)

9. Select the users that you want to add to the queue and click on Enable
10. Click on the Save button

Current Admin:
Scovel, Natalie
US TMA

Organizations
Application Users
Queue Users

- [User Search](#)
- [Add User](#)

Queue Users

User Queue: Naval Hospital [Modify]

Queue Members

- Chad Michael Dunlap
- Erin Miller
- James Wilson
- Clinton Portis

All Other Users

- Admin 53
- Admin Admin
- Admin3 Admin3
- Admin4 Admin4
- Admin5 Admin5
- Admin6 Admin6
- Admin7 Admin7
- Admin8 Admin8
- Amanda Colantuoni
- Amanda Dunlap
- Amanda Foster
- Andy Cirillo
- Chad Michael Dunlap
- Chris Foster
- Christopher Brown
- First Middle Last
- Fred Thomas
- Igor Mameshin
- Joe Johnson
- Joe Jones
- Joe Miller
- Joe Smith
- Kevin York
- Laverneus Coles
- Liza Dorsey
- Mike Beedle
- Mouse Mickey
- Natalie Scovel
- Natalie Scovel

[Enable] [Disable]

[Save]



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User Admin Functionality

Requester Favorites (1 of 6)

- An organization can create a list of requester "favorites" that show up in the requester drop-down list box
- User Admins can set up the list of favorites per organization
- If an organization name is not in the favorites list, the user will be allowed to search for it manually
- A given "requester" can appear in multiple "favorites" lists



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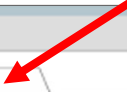


User Admin Functionality

Requester Favorites (2 of 6)

1. Select the Admin Tab
2. Select the Organization's hyperlink
3. Select the ID hyperlink for your Origin Organization

Monday, January 24, 2005 Logoff

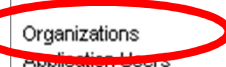
User **Admin** 

Current Admin:
Scovel, Natalie
US TMA

Organizations

Origin Organizations

ID	Name	Parent Name	Address	Contact Person	Contact Phone
<u>1006</u>	10th MED GROUP-USAF ACADEMY CO	USAFA	4102 Pinion Drive Ste 4000 USAF Academy, CO 80840		
<u>1009</u>	10th Med GROUP- PETERSON AFB	HQ AIR FORCE SPACE COMMAND			
<u>907</u>	11TH MED GRP-BOLLING	HQ Air Force (Direct reporting unit)	238 Brookley Avenue RM 125 Bolling AFB, DC 20032		
<u>1070</u>	11th Wing	US Air Force	11 MDG/SGHQ 238 238 Brookley Ave Bolling AFB, DC 20032		


Organizations
Application Users
Queue Users
[User Search](#)
[Add User](#)



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User Admin Functionality

Requester Favorites (3 of 6)

4. Scroll down to Favored Requesters and click on the Add button

Update

Contact People [New](#)

ID	Name	Phone	Address	Primary
There are currently no contact people associated with this organization. Click new to add one.				

Child Organizations [New](#)

ID	Name	Address	Contact Person	Contact Phone	Active
There are currently no child organizations associated with this organization. Click new to add one.					

Favored Requester [Add](#)

ID	Name	Address
There are currently no favored requesters associated with this organization. Click new to add one.		

Associated Addresses [New](#)

ID	Street	City	State	Zip	Alternate	Primary
709	4102 Pinion Drive Ste 4000	USAF Academy	CO	80840	No	<input checked="" type="radio"/>



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User Admin Functionality

Requester Favorites (4 of 6)

5. Enter organization search criteria
6. Click on the Search button

26, 2011 [Logout](#)

User Admin

Requester Search

Choose one of the following options:

A. Select a Third-Party Organization (a third-party requester, such as a law enforcement agency or insurance company)

[Select](#)

B. Search for a Person (search for another person, or add a new one*)

Name (Last) (First) An "*" may be used as a wildcard.

System ID (the identification number created by this system for the person)

EDIPH (an external identifier for the person)

☒ Include Patient Records

☒ Include Non-Patient Records

[Search](#)

C. Search for an Organization (search for another organization, or add a new one*)

Name (All or part of the name of the organization. An "*" may be used as a wildcard.)

DMIS Code (the external identifier for the organization)

[Search](#)

* You must search for an existing requester or requesting organization before adding a new one.

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User Admin Functionality

Requester Favorites (5 of 6)

7. Select the correct organization by clicking on the name

January 26, 2011 [Logoff](#)

User Admin

Requester Search Results

Search Results - Click on the name to select a requester

Name	Active	ID	Address
1 MDG Langley AFB Anywhere USA	Yes	1263	519 Pine Chaple Rd., Bldg 257, Langley Afb, VA 23665
10 Downing Street [1010]	Yes	1199	10 Downing St., APO, AE 09464-5000
101 mp det	Yes	1200	121 Washington St, Columbia, SC 29223-2522
15th Medical Group [0287]	Yes	1177	565 Scott Circle, Hickam Afb, HI 96782
1ID CID	Yes	1301	Cmr 442, Box 555, APO Ae 09042, AL, GM
245th district court	Yes	1258	555 N Mesa, El Paso, TX 76666-2410
283rd District Court	Yes	1256	200 Lincoln St., El Paso, TX 72222-2222
325Medical Group	Yes	1198	340 Magnolia Circle, Tndall Afb, FL 32404-5612
34th Circuit Court	Yes	1186	2345 E. Paisano, El Paso, TX 79920
5th Homebase	Yes	1242	123 Somewhere Ln., Minot, ND 58705-1111
60th MED GRP-TRAVIS-60 MDSS	Yes	1358	David Grant Medical Center, 60 Mdg/ofc Sym 101 Bodin Circl, Travis Afb, CA 94535
71st Medical Group, Vance AFB oklahoma [0338]	Yes	1141	527 Gott Rd., Enid, OK 73705-8999
89th MDG	Yes	1282	1234 Boggie Ln., Camp Springs, MD 22222-1111
AFIP	Yes	1193	6825 16th Street, Nw, Washington, DC 20306-6000
APG JAG	Yes	1240	
Aetna	Yes	1311	234 Hhh St. Dc. DE 22345



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User Admin Functionality

Requester Favorites (6 of 6)

- If the requester you are looking for is not listed, scroll to the bottom to add a new organization or person

<u>Where are you</u>	Yes	1205 23, Arlington, VI 25468
<u>Williams Medical Insurance Claims</u>	Yes	1303 222 Taylor, Arlington, VA 09601
<u>Ziqi Law Services</u>	Yes	1202 666 Post Ln, Suite 1, Carlisle, PA 17013-5003
<u>beatty and Assoc [1234]</u>	Yes	1191 1234 Str, Heretown, LA 12344-5666
<u>big bird inc.</u>	Yes	1176 Asdf, Asdf, Asdf, CA 25896
<u>dffasdf [fff]</u>	Yes	1331 Dfaasd, Sdaf, Sdfasdf, AL 44444-4444
<u>dilorenzo tricare health clinic [0256]</u>	Yes	1281 5801 Army Pentagon, Washington, DC 20310-5801
<u>dodah</u>	Yes	1154 111, Ws, CO 98373
<u>fake facility</u>	Yes	1284 1987 Mimmin Way, Lawton, AK 30987-1234
<u>law office of michael gopin</u>	Yes	1262 200 E San Antonio, Smithfield, TX 22222-5555
<u>new requestro</u>	Yes	1155 111 First, Wells, AK 12344
<u>nikki easton</u>	Yes	1126 8912 Holton Rd, Temple Hills, MD 22302
<u>northwest region</u>	Yes	1174 Fort Lewis, Tacoma, WA 98433
<u>osi</u>	Yes	1150 Doolittle, Earfo, SD 57706
<u>pZZA hUT</u>	Yes	1285
<u>pZZA hUT</u>	Yes	1286 Next Door, Here, AL 12121-2111
<u>robert murray</u>	Yes	1182 29796 River Dr, Libertyville, IL 68098
<u>sdf</u>	Yes	1127 Sdf, Asdf, CA 22222
<u>us primary training organization [1118]</u>	Yes	1241
<u>valencia hall day care</u>	Yes	1269 3952 N Market St, St. Louis, MO 63113
<u>valencia hall daycare</u>	Yes	1271 2936 Olive St, St. Louis, MO 63113
<u>wally Read</u>	Yes	1130 15156 Royal Georgian Rd., Gurnee, AL 24567
<u>walt disney</u>	Yes	1131 3202 Holton Ln., Temple Hills, MD 22302

Other options:
 Add your search criteria and confirm.
 Create a new requester as a person.
 Create a new requester as an organization.



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User Admin Functionality Summary

- You should now be able to:
 - Setup a workflow
 - Setup a queue
 - Create requester favorites



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PHIMT

Help Desk

- Responsible for:
 - Creating user accounts
 - Updating user accounts
 - Assisting users with questions and/or issues
- Contact Information
 - mhssc@timpo.osd.mil
 - CONUS: (800) 600-9332
 - OCONUS: visit the MHS Help Desk web site (<https://mhssc.timpo.osd.mil>) for a list of access numbers



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PHIMT

Presentation Summary

- You should now be able to:
 - Identify the use of the PHIMT in meeting the Accounting of Disclosures requirement of the HIPAA Privacy Rule
 - Describe the necessary policies and procedures
 - Describe the user roles and responsibilities within the PHIMT



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